End User Manual for General Practitioners (GPs) using SystmOne

for Choose and Book R2.3

Welcome to the End User Manual for GPs using SystmOne for Choose and Book R2.3

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1   Contents

WHAT'S NEW IN THIS MANUAL?

All sections of this manual have been revised and rewritten to reflect the new functionality in R2.3 of Choose and Book. In particular, the new items are:

- Patient Details screen has been updated to remove registered GP details and address fields changed
- Redrafted smartcard login section completely
- Patient postcode is automatically populated on the booking screen
- NHS number and UBRN fields in the patient search section have been divideed into 3 fields

2   Background to Choose and Book

Choose and Book is the nationally commissioned system built by Atos Origin to provide the NHS with an electronic booking and choice tool. Choose and Book first went live in 2004, and is now at release version 2.3 (R2.3), which went live in December 2005.

Choose and Book enables a patient to choose where they wish to attend for an outpatient appointment from those commissioned by their Primary Care Trust (PCT), and make a booking of a date and time of their choice, from those available.

This end user manual sets out the functions that a General Practitioner (GP) or referrer can perform in Choose and Book using SystmOne to access Choose and Book.

Choose and Book enables a GP to refer or book a patient to a service commissioned by their primary care trust (PCT), and to send an electronic referral letter with that referral or booking

The functions that a GP can do in Choose and Book when completing a referral and booking are:
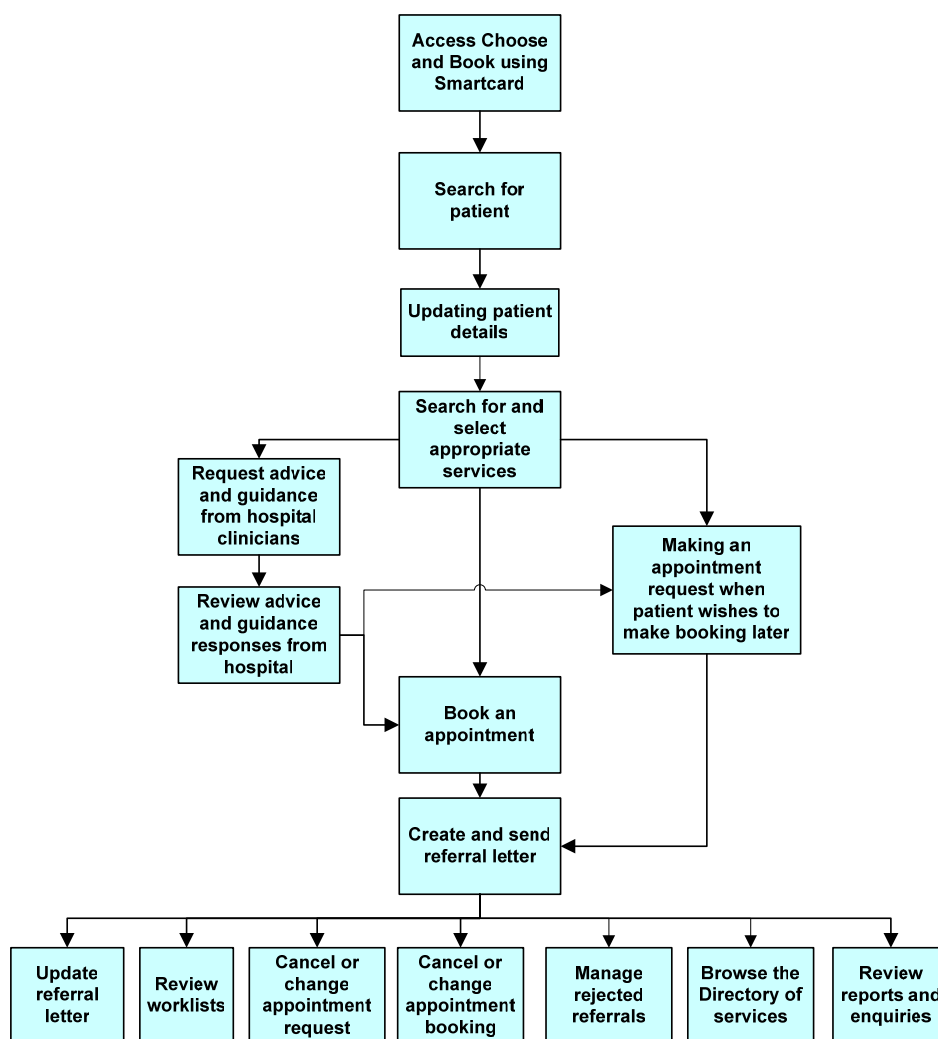
3   Accessing Choose and Book via SystmOne using a Smartcard

To access Choose and Book via SystmOne, you must first use your Smartcard to connect you to the Spine of the NHS Connecting for Health programme.

3.1. Using your Smartcard to Log on to the Spine

⇒ A Smartcard looks much like a credit card, with a picture of the user, together with their Unique Identification number (UID) and a gold chip where all the information is held.
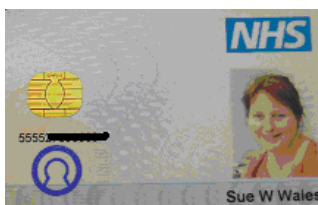
⇒ To access Choose and Book, you should already be logged on to your computer, so you see your desktop on your screen

⇒

⇒ Put your smartcard into the smartcard reader

⇒

⇒ Type in your Pass Code and click on **Yes** or **OK** or press return on the keyboard

⇒

⇒ You may (depending on local set-up) now see a security alert.

⇒ Click ⬭ Yes ⬭ to proceed

⇒ If you have more than one role set up on your Smartcard you then see a screen saying **Welcome** with the role(s) you have been allocated on the Spine.

⇒ Click in the box next to the role you wish to be for this session so there is a tick in the box next to that role.
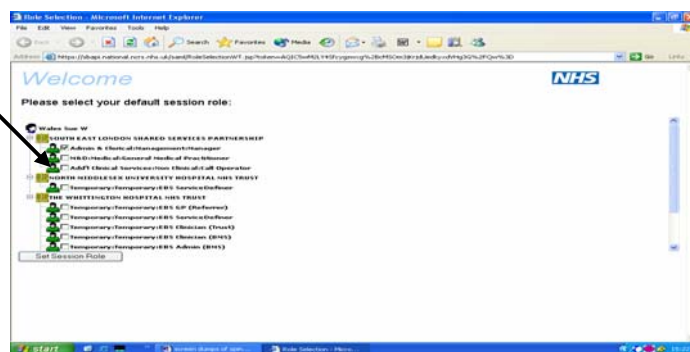
⇒ Click ⬭ Set Session Role ⬭

⇒ Now the system asks if you want to close the present window. Click on [Yes]
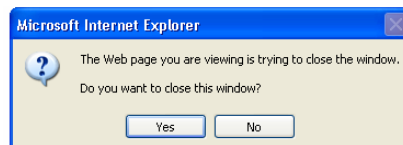
⇒ You are now returned to your desktop, having successfully logged on to the Spine.

3.2. Logging in to SystmOne

⇒ To log into SystmOne using your smartcard double click the SystmOne icon on your desktop then click the card icon on the Login screen
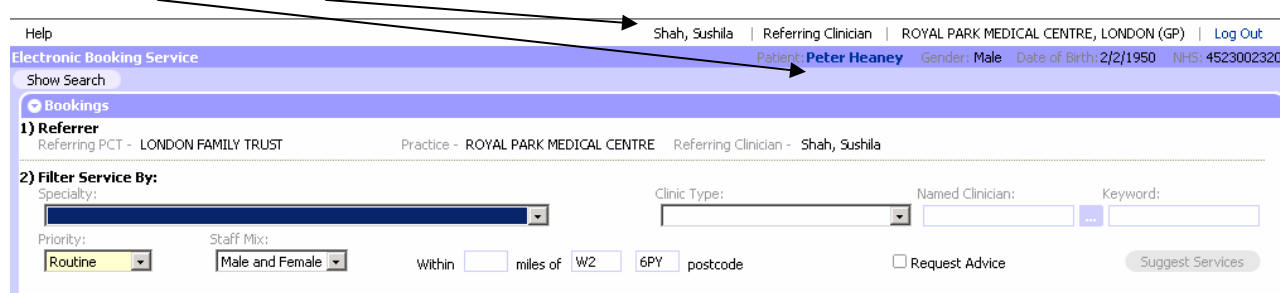
4   Entering Choose and Book via a Patient Consultation in SystmOne to Select Services or make an Appointment Request

If you decide your patient needs a referral to a Service Provider, you can use Choose and Book to initiate a referral and/or make a direct booking

4.1. Selecting a Patient

⇒   To make a referral or booking using Choose and Book, you first need to open a patient's record in SystmOne and record your consultation in the normal way

⇒   Right-click on the **Communications** node in the Clinical Tree and select **New Choose & Book Referral** or select the **Communications** node from the Clinical Tree and click [icon] in the toolbar.

⇒   This action will cause Choose and Book to generate a UBRN (Unique Booking Reference Number). The UBRN is a key piece of data that identifies the booking throughout the lifecycle and ties together the booking and the associated referral letter. If the patient decides to complete a booking later via the Internet or by telephone the UBRN is required in addition to a password.

⇒   Choose and Book is now launched and you see the Choose and Book **Bookings Screen** where you can search for services to refer your patient to. At the top of the screen the Patient and Referrer details are displayed.

⇒   You now need to enter the criteria against which Choose and Book will search for appropriate services that your PCT has commissioned

NB: The yellow fields are mandatory to be completed to enable a search for services.

⇒   You can search for services by different means:
   - by Specialty, Clinic Type and Priority
   - by Named Clinician
   - by Keyword

NB: The above searches are not mutually exclusive; e.g. you can search by Named Clinician with Specialty or you could search by Keyword and Named Clinician

4.2. Searching for services by Specialty, Clinic Type and Priority

⇒   Select a **Specialty** from the pick list
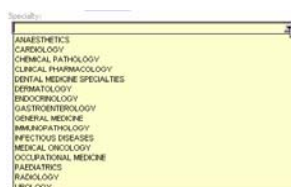
⇒ Once you have selected a Specialty, you can use the Service Selection Booking Guidance to help you to decide on the Clinic type and Priority (see section 4.2.1) or you can select Clinic Type and Priority of your choice (see section 4.2.2)

4.2.1 Using Service Selection Booking Guidance

⇒ Click on   to get to the **Service Selection Booking Guidance**. This is an algorithm of questions to help you choose the most appropriate **Clinic Type** and **Priority** for your patient

⇒ On each page of the guidance algorithm, answer the question and click   Next   to move on to the next page and question

⇒ The **Service Selection Booking Guidance** will give you a recommended **Clinic Type** and **Priority** according to the answers you have given to the questions

⇒ You can accept or reject the recommendation. If you wish to override the recommendation, click the **Override** box and select an **Override Value** and an **Override Reason** from the pick lists

⇒ Once you have completed this screen, click on   Done   and you are returned to the main booking screen

⇒ If you accepted the recommendations, the **Clinic Type** and **Priority** fields will have been automatically populated

⇒ If you rejected the guidance recommendations, you should select the most appropriate **Clinic Type** and **Priority** from the pick lists

4.2.2 Selecting Services

⇒ If you do not use the Service Selection Booking Guidance, you can select a **Clinic Type** and **Priority** of your choosing

⇒ If your patient wishes to be seen in an all female clinic (for example), you can select this as a search criterion from the pick list of **Staff Mix** in the upper right side of the screen

⇒ If your patient does not wish to travel far, you can type in their postcode and the maximum number of miles the patient would wish to travel from their home address

⇒ Once you have completed all the yellow mandatory fields plus any other search criteria your patient wishes, click on   Suggest Services

⇒ Choose and Book will search the Directory of services for those services that meet your search criteria that have been commissioned by your PCT.
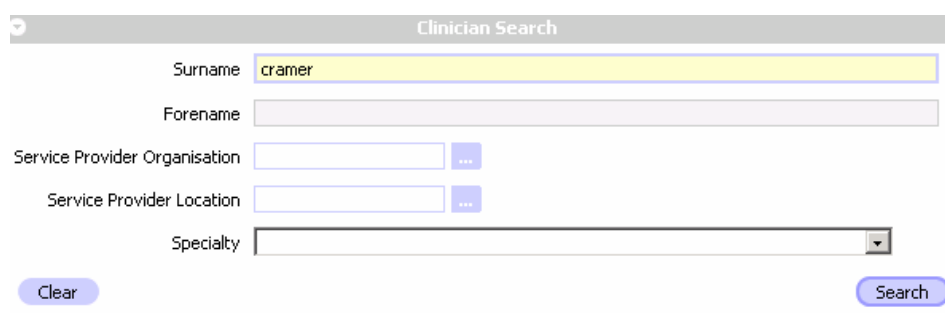
4.3. Searching for services by Named Clinician

⇒ The availability of the named clinician referrals functionality is dependent on whether this functionality has been taken up locally and where directly bookable services are being offered the version of PAS compliance.

⇒ **Named Clinician** means that you can search for services that your PCT has commissioned for a particular 'Named Clinician'.

⇒ To search for those services of a particular **Named Clinician**, you will first need to search for your named Clinician. Click on the purple box to the right of the **Named Clinician** field

⇒ Enter the **Surname** of the desired Clinician you wish to find, and enter any further details if you wish to limit the search findings (e.g. forename, organisation or location or specialty)

⇒ Click on Search

⇒ Choose and Book now shows you all the Named Clinicians in the system that meet your search criteria

⇒ You are given the full name of the Clinicians and their role and locations that are in the Directory of Services (DOS).   You can see in the picture that Justin Cramer is a named Clinician for a service or services only at the Royal Acute Trust

⇒ However, Richard Cramer is recorded as View Multiple . This means that Richard Cramer is Named Clinician for more than one service in more than one location

⇒ To view the details of a named Clinician, click on their name in blue, and you will see their details. Click on the name in blue again to close the window

⇒ If you click on **View Multiple**, you will see the variety of services for that named Clinician

⇒ To select one of the Clinicians, click on their row to highlight them in orange and click **Done**

⇒ You will now see the name of the Named Clinician that you have selected in the **Named Clinician** field in the main screen.

4.4. Searching for services by Keyword

⇒ You can also search for services by **Keywords** to the right of your screen

⇒ You can type in a full keyword relating to the condition of your patient, or you may enter part of a word

⇒ It is recommended that you select a Specialty as well as entering a keyword, to limit the results to your search

⇒ Click **Suggest Services** to see which services your PCT has commissioned that have your keyword in its DOS entry

4.5. Shortlisting Appropriate Services for your Patient's Needs

⇒ You will now see the services available for your patient to choose from

⇒ You can get more detailed information about each of the services offered by clicking on the name of a service, and Choose and Book will now display for you the full information that is recorded in the Directory of Services on that service. This is your opportunity to check that the choices you will offer your patient are all fully appropriate to their particular referral need.

⇒ The Patient Info column has a web link to www.nhs.uk where you find information about that service on nhs.uk

⇒ If you select several services and then click on the **Compare Services** button, you will see information on www.nhs.uk showing the services side by side so you can compare them.

⇒ If, at this stage you decide not to proceed with an appointment request, click Don't Submit

⇒ You return to your Homepage, where you can either click on Actions again to proceed with another search for service, or you can search for another patient.

⇒ Once you have read the service information, you can select either one or several of the services for your patient, by clicking in the box to the left of the service name, to see who has the earliest appointment available between all the appropriate services.

NB: If you only select one option at this stage, your patient will only have that one option available to them if they call the Choose and Book Call Centre to make a booking later on. So, if your patient wants to go home to discuss the options with their family, you should tick all the clinically relevant options at this stage to keep all those choices open to the patient when they contact the Call Centre later.

4.6. *Directly and Indirectly Bookable Services*

⇒ The columns of services show the **Service Name**, **Directly Bookable** and **Location**.

⇒ A Y in the Directly Bookable column means that a service is **Directly Bookable** (i.e. you can book your patient for an appointment in the service provider's PAS electronically using Choose and Book).

⇒ An N in the Directly Bookable column means that a service is an **Indirectly Bookable** Services (IBS) (i.e. you cannot directly book your patient in for an appointment in that service provider's PAS electronically, but you can Indirectly Book your patient in to their service where the patient calls the IBS call centre).

⇒   You can view the Booking Details of an IBS by clicking on the Service name (in blue).

⇒   Click on Booking Details to reveal the detailed information about the hours of opening and the telephone number of the IBS call centre.
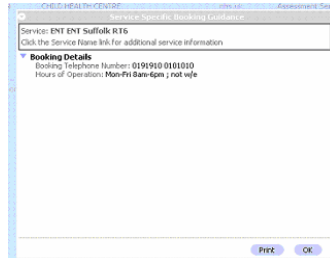
⇒   You can print off this information if you wish, by clicking Print

⇒   Click **OK** to return to the main bookings screen

⇒   You can shortlist and select a mix of both Directly and Indirectly Bookable Services for your patient.

5 Making an Appointment Request when a Patient wishes to make a Booking Later and Printing a Summary

The GP does not have to complete a booking at this stage but can instead complete the 'Appointment Request'; if your patient wants to go home and think about where and when they would like to be seen at the hospital and call the Call Centre, or if you wish your Practice Admin staff to complete the booking, you can simply print off an 'Appointment Request Summary' at this stage and give it to the patient.

5.1. Completing an Appointment Request and Printing a Summary for your Patient

⇒ Having selected the appropriate service(s) for your patient (see section 4.5), click on Request near the bottom right hand corner of your screen to complete an Appointment Request.

⇒ You see a summary of the options selected plus the patient's details. You may have either directly or indirectly bookable services selected, or a mixture, and they will all be listed here.

⇒ The **Referral Letter Outstanding** is automatically ticked if the services you are making a request for require a referral letter, and you cannot change this if the service requires a referral letter to review.

⇒ You have the option to tick the **Content Sensitive** box. Making an appointment request 'Content Sensitive' restricts who can see any information about this appointment request. This means that in the referring practice, only the referrer in person can view any information at all about this particular appointment request. All staff in the associated workgroups within the service provider you are referring to, will be able to view information about that appointment and referral. The BMS will NOT be able to view any information, so if you make a request Content Sensitive, the patient cannot call the BMS to complete their booking. If you make an appointment request Content Sensitive by ticking the box, you must remember that only you will be able to view anything about that appointment request within your practice, which may not be appropriate if you are not due to be available in the near future within that practice.

⇒ In the **BMS Follow Up** field, select the maximum numbers of days by when you want your patient to have been in touch with the BMS call centre or practice or the IBS call centre or the internet to make the booking. (This is useful to make sure your patient does actually make a booking for your referral). If your patient has not made the booking within the number of days you specified, the Choose and Book Appointments Line (CABAL) is notified in Choose and Book, so they can send a reminder letter to the patient to complete the booking process.

⇒ Click on Submit to apply the appointment request

⇒ You now see the summary with 4 options: Update Person, Add Referral Letter, Compare Services or Print

⇒ Click **Update Person** - You can update your patient's details on the Spine, including changing the automatically set patient password in their record (see section 17).

⇒ Do not use **Add Referral Letter** at this stage, as you will create and send your referral letter via Choose and Book from EMIS LV (see section 8)

⇒ Click on **Compare Services** - You see information on www.nhs.uk showing the services side by side so you can compare them.

⇒ To print off a summary of the Appointment Request and your patient's password click Print . You then have the option to print just the Appointment Request Summary, or the Appointment Request Summary <u>and</u> the Patient Password.

⇒
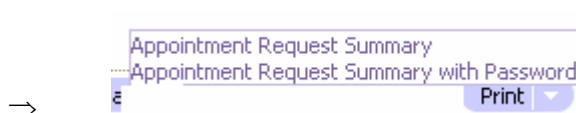
⇒ Click on the option you wish. The Appointment Request printout includes the telephone number of the CABAL, where the patient can complete their booking for the directly bookable services, and the telephone numbers and booking details of each of the indirectly bookable services (IBS) you have selected with the patient.

NB: The password is created after a referral is initiated in Choose and Book, if the patient password is deleted , they will not be able to complete or change their booking with the CABAL, or the IBS Call Centre or on the Internet. If the password is changed at the patients request it must be a minimum of 6 characters in length.

$\Rightarrow$ The patient can then either take that printout to your Practice Admin Team, or they can call the IBS Call Centre (for an IBS) or the CABAL or they can access the internet at www.nhs.uk/healthspace (for a DBS) later to complete their booking.

$\Rightarrow$ Once you have printed off the summary, you are returned to the summary screen, where you can again either : Update Person (see section 17) or Add Referral Letter (see section 8) or Close

$\Rightarrow$ At this stage you can finish your Choose and Book actions by clicking on Close and you can then attach your referral letter, once created, from EMIS LV.

$\Rightarrow$ Close Choose and Book by clicking on **Logout**, and then the ☒ at top right of the window

$\Rightarrow$ This returns you to the **Create Choose and Book Referral Letter** screen within SystmOne (see section 11).

$\Rightarrow$ At this point the GP can either complete the referral letter and send to Choose and Book or decide to create it later.

6   Making an Appointment Booking

If you and your patient wish, you can immediately complete the booking of when and where the patient is seen, for **directly bookable** services only.

⇒ You will have first selected appropriate services for your patient (see section 4.5)

⇒ Before asking Choose and Book to find available appointments for the service(s) you have selected, you can limit the search by filling in the date range of when your patient should or wishes to be seen.
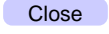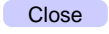
⇒ The **Due By** date is the latest date by when you want your patient to be seen at the hospital.

⇒ The **Start Date** (defaulted to the current date) and **End Date** are the dates within which you want to view available appointment slots for your patient to be seen at the hospital.

⇒ Click on Suggest Appointments and Choose and Book will display in chronological order all the appointment slots for all your selected services within the date ranges you have specified.

⇒ You can use the scroll bar to see up to 50 appointments currently available. (You can click the Next button to see the next 50, and Back to see the previous 50)

⇒ You can change the view by clicking on '**Week**' or '**Month**' if you wish

⇒ Select one appointment of the patient's choice by clicking on the round radio button to the left of the chosen date and time

⇒ Click Book   (NB: Don't click Request at this point as this will not book the appointment in the selected slot, it will just create an appointment request).

⇒ Review the appointment details

⇒ If the details are correct, click Submit and Choose and Book will check with the PAS real-time to see if that slot is still available. If the communication between Choose and Book and the PAS fails, you will get a message telling you so. Repeat the booking process as above.

⇒ If the booking details are not correct, click Don't Submit to go back to the previous screen

⇒ To print off a summary of the Appointment and your patient's password click Print . You then have the option to print just the Appointment Summary, or the Appointment Summary and the Patient Password.

Appointment	Summary
Appointment	Summary with Password
	Print ▾

⇒   Click on the option you wish.

⇒   Select the printer you want to print to and click   OK

⇒   Click   Close   to close the Print Appointment Confirmation screen

⇒   Click   Close   to close the Appointment Summary screen

⇒   You have now made a booking for your patient and printed off for them a summary of their appointment made.

⇒   Close the Choose and Book service by clicking the   Log Out   button in the top right hand corner of the screen then click the ✖ at top right of the window

⇒   This returns you to the **Create Choose and Book Referral Letter** screen within SystmOne (see section 11). At this point the GP can either complete the referral letter and send to Choose and Book or decide to create it later

NB: Inform the patient that the Provider will send them a clinic letter to confirm their appointment and to give them more details about how to get to the room where the clinic is being held.

7   Accessing the Choose and Book Home Page

Some tasks within Choose and Book can only be accessed via the Choose and Book Home Page.

7.1. If you have a Choose and Book icon on your desktop

⇒ Double-click on the Choose and Book icon on the desktop to launch Choose and Book
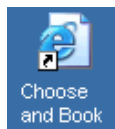
⇒ Choose and Book sometimes takes a little while to check your authentication, and then if you have one Choose and Book Business Function the homepage will open; if you have more than one Business Function you will go to the Role Selection screen.

⇒ You have now accessed Choose and Book

7.2. If you do NOT have a Choose and Book icon on your desktop:

⇒ Open **Internet Explorer** from the icon on your desktop.
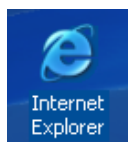
⇒ In the **Address Box** of the internet screen, type in   **https://nww.ebs.ncrs.nhs.uk/app-ebs**

⇒ Choose and Book sometimes takes a little while to check your authentication, and then the Choose and Book Home Page will open showing you the Choose and Book Business Functions available to you

⇒ You have now accessed Choose and Book using your smartcard

⇒ If you have one Choose and Book Business Function the homepage will open; if you have more than one Business Function you will go to the Role Selection screen.
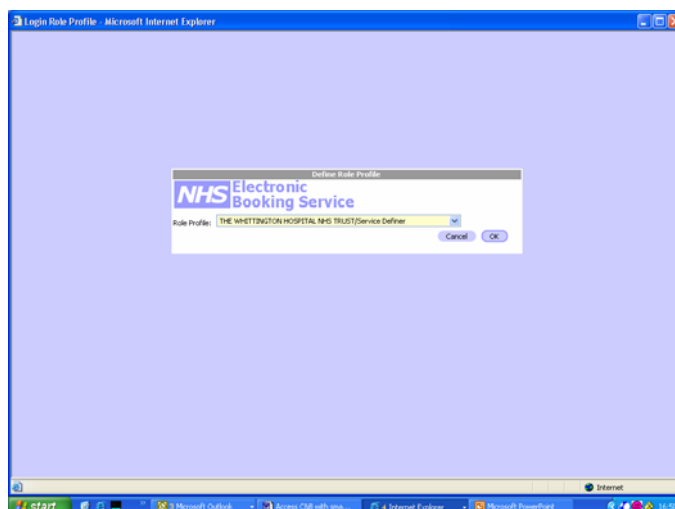
NB: Your Smartcard must remain in the smartcard reader for the whole time that you are using the system. If you pull your Smartcard out of the reader, your session will end.

⇒ As a GP, within Choose and Book, you will have been given the Business Function of "**Referring Clinician**".

⇒ Select **Referring Clinician** from the pick list and click ⌒ OK ⌒

⇒ The Referring Clinician Home Page displays, this has 2 main sections: **Search** (on the left) and **Worklists** (on the right).
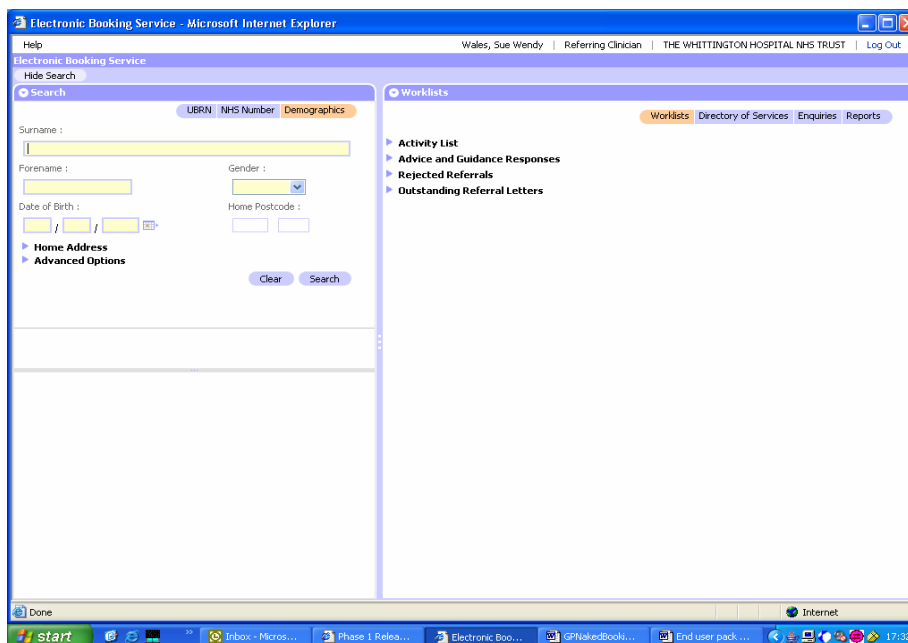
⇒ The **Search** section is where you can search for your patient from the Patient Demographic Service (PDS) on the Spine.

⇒ The **Worklists** section gives you the latest information on the patients you have initiated or completed bookings for, and is a useful tool for you to check if you have any outstanding actions.

⇒ You can also browse the Directory of Services by clicking on '**Directory of Services**' (see section 16), or you can access enquiries by clicking on '**Enquiries**' or you can access reports by clicking on '**Reports'.** (See section 17)

8   Searching for a Patient in Choose and Book

If you enter Choose and Book via the Internet rather than via a referral from SystmOne, you will not have already selected a patient.

8.1. Selecting a Patient

⇒ There are 3 ways that you can search for a patient; by UBRN, NHS Number or by Demographics.

⇒ If you know your patient's NHS Number, click on **NHS Number** and then enter the NHS Number in the box and click on Search . *(NB: NHS number is the fastest way of finding your patient)*

<div align="center">NHS :   992 – 002 – 0001</div>

⇒ If you know your patient's Unique Booking Reference Number (UBRN) you can click on UBRN and then enter it in the boxes and click Search

<div align="center">UBRN :   0000 - 9000 - 9007</div>

NB: The UBRN is a number generated by Choose and Book for your patient's particular appointment request.

⇒ If you do not know the NHS Number or UBRN, click on Demographics and then enter the patient's **Surname**, **Forename**, **Gender** and **Date of Birth** (Please check the spelling of forename and surname with your patient).

⇒ If you know it, you can also add in the patient's **Home Postcode**. Check to ensure that the postcode provided is for their *permanent* address and not that of a temporary address (e.g. temporary resident or on holiday). Check if the patient has recently moved and whether they informed their GP; if they did not inform the GP, ask for their previous address. If the postcode is not known by the patient, do <u>not</u> enter a default like XX99, but use the Advanced Options

NB: Yellow fields in Choose and Book are mandatory.

⇒ Click on   Search

⇒ Choose and Book will search for your patient in the PDS on the Spine.

⇒ If your patient is not found or there are more than one exact matches found in the PDS, a message in red will tell you so, and you then can enter more search criteria by clicking on either **Home Address** or **Advanced Options** and click on   Search   .

NB: for your patient to be found on the PDS, they must have an NHS Number. Patients without an NHS Number cannot be referred using Choose and Book.

NB: for CAB to display the patient, the PDS must return a single hit from the PDS, otherwise the user must enter additional search criteria until the PDS returns a single patient.

⇒ Once your patient is found, their name and NHS Number will appear at the bottom of your search section in blue

8.2. Logging out of and Closing Choose and Book

⇒ To log out of Choose and Book you click on `Log Out` near the top right of the screen

⇒ This takes you back to the selecting role screen, so if required, you can select another Choose and Book role, and go back in to the tool from here.

⇒ To exit Choose and Book completely, you need to click on the '**X**' at the top right corner of the screen.

9   Advice and Guidance Requests

Advice and Guidance is an electronic one-question-one-answer conversation between a Referrer and a Service Provider Clinician that deals with a patient's medical information.
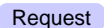
Instead of progressing with an appointment request or booking, you can select a service, and then ask the provider Clinician team from that selected service for advice and guidance about your patient or your possible referral.

9.1. How to Request Advice and Guidance

The procedure for getting in to Choose and Book for this purpose is exactly the same as for a referral. To distinguish between this kind of request and a full referral you should use the Free Text to note the request is for advice and guidance only
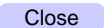
⇒ Record your consultation in SystmOne as usual

⇒ Right-click on the **Communications** node in the Clinical Tree and select **New Choose And**

    Book Referral or select the **Communications** node from the Clinical Tree and click in the toolbar.

NB: If you have not used your smartcard when logging into SystmOne, the online booking functions will not be enabled

⇒ Select a **Specialty**, then **Clinic Type** and **Priority**, or use the **Access Service Selection**, **Named Clinician** or **Keyword** search to search for appropriate services (see section 4.2).

⇒ Click ☑ Request Advice to show that you wish to search for those services willing to respond to your request for advice and guidance

⇒ Click Suggest Services

⇒ Choose and Book now displays only those services that your PCT has commissioned, meeting your selection criteria *and* that have agreed to respond to advice and guidance requests

⇒ Select a single service by clicking the tick box in front of that service

⇒ Click Request

⇒ Type your request for advice and guidance in the yellow box

> Anne Wakefield is a 59 year old woman who was an inpatient under your care two weeks ago for chest pain and feeling dizzy. I abnormalities. She came to see me in surgery today telling me that you were planning to follow her up with coronary angiograph
>
> Could you please let me know the arrangements for this as she has had two further episodes of chest pain and dizziness and is Thank you.

⇒ Click Submit

⇒ You now have the option to print off your advice and guidance request if you wish, by clicking on Print then selecting your printer from your print box.

⇒ Click Close

⇒ Click '**Log Out'** to return to SYSTMONE.

9.2. How to View Advice and Guidance Responses

You can access the advice and guidance responses that you receive from service provider Clinicians through the worklist screen in Choose & Book.

⇒   Access Choose and Book via Internet Explorer (see section 7)

⇒   The Choose & Book Home Page will display

⇒   Click on   **Worklists**   to see your worklists
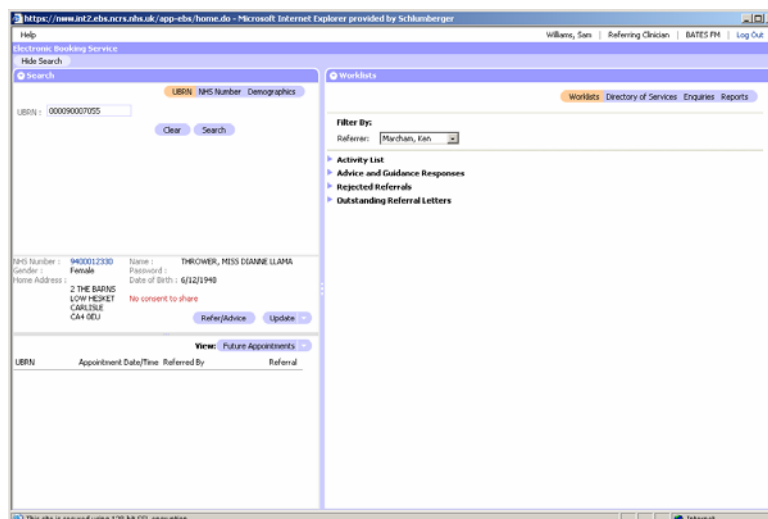
⇒   On your worklist screen, click on **Advice and Guidance Reponses**
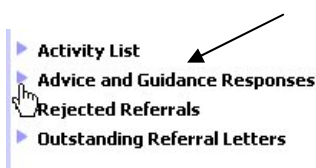
⇒   Click the **UBRN** of the patient that you want to review a response from
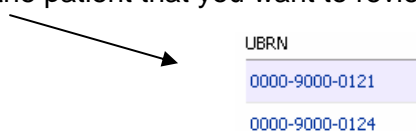
⇒   Click **Actions** and select **View Advice Request**

⇒   Read the response

⇒   Click **Close** to return you to VISION

NB: The UBRN will remain in your Advice and Guidance Responses worklist for 6 months, or until you remove it from your worklist (see section 12).

9.3. How to Convert an Advice and Guidance Response into a Booking

⇒ From your worklist screen, open the **Advice and Guidance Reponses** worklist

⇒ Click the **UBRN** of the response you wish to review and progress

⇒ Click [Actions ▾] and then **Update Advice Request**

⇒ This now takes you to the Booking Screen where you can select more services if you wish, then click on [Request] or [Suggest Appointments] to progress the booking

⇒ Complete the appointment request process or booking process (see sections 6).

9.4. How to Remove an Advice and Guidance Response from your Worklist

⇒ From your worklist screen, open the **Advice and Guidance Reponses** worklist

⇒ Click the **UBRN** of the response you wish to remove from your worklist

⇒ Click [Actions ▾] and select [Close Advice Request]

⇒ This will remove the response from your worklist

10   How to Create and send an Electronic Referral Letter

⇒ Once the booking has been made, either at the time of the consultation or later, the GP needs to go back into SystmOne and complete the referral letter to accompany the booking to Choose and Book.

⇒ Local policies will dictate the time frame in which the GP must do this. It should be noted that the referral will not appear to the secondary care Consultant for Rejection or Approval until both the booking has been made and the referral letter sent.

⇒ Retrieve the patient record

⇒ Select the **Communications** node in the Clinical Tree

⇒ On the **Outgoing tab**, right-click on the referral you created earlier and select **Amend**

⇒ Choose the **UBRN** for the booking for which the referral letter is to be sent to enter the **Create Choose and Book Referral Letter** window.

⇒ The user can specify the type of referral as well as the diagnosis the patient needs (the information specific to the reason for the referral being booked).
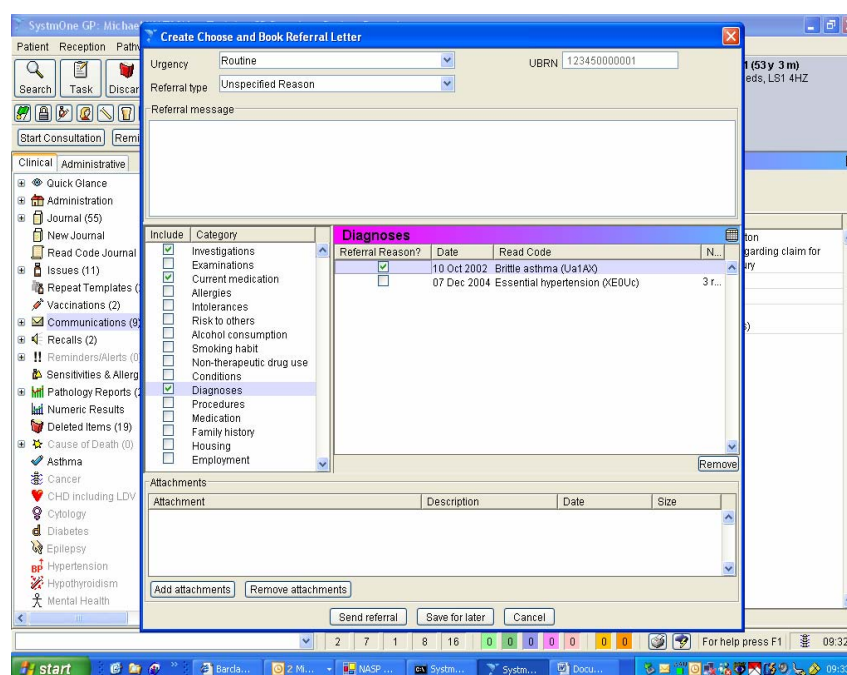
(NB: This picture is missing a 4th button of Print Patient Letter)

10.1. To produce a referral letter:

⇒ Type the body of your referral letter into the **Referral message** field.

⇒ From the list in the left-hand pane of the window, select the **Include** tick-box beside any information types you want to include in the referral from the patient record.

⇒ Select the **Referral Reason** tick-box beside the relevant entry or entries in the right-hand pane. You must select at least one referral reason.

⇒ If you want to remove any entries that not relevant to this referral, select the entries and click the **Remove** button at the foot of the right-hand pane.

⇒ Click **Add Attachment** if you want to attach a file to the referral (you can attach up to four files). The files you have attached are displayed in the **Attachments** field.

10.2. Send a referral

⇒ Click the **Send Referral** button

⇒ This will send the information to the Choose and Book service via Spine, (see Note 1)

10.3. Save the referral

⇒ Click the **Save for later** button

⇒ This will save the referral under the **Communications** tab for that patient and will mark the referral as **Unsent**, (see Note 1).

10.4. To resume an unfinished referral

⇒ Right-click on the referral on the **Outgoing** tab of the **Communications** screen and select **Amend**.

10.5. Cancel the referral

⇒ Click the **Cancel** button

⇒ This will discard the referral letter. (See Note 2)

Note 1: The referral is saved on SystmOne and the Communications screen is displayed unless:

- You have not specified a referral reason. You will be prompted to select one from the displayed list before the referral can be sent.

- The referral is not sent successfully. In these circumstances you will remain in the Create Choose And Book Referral Letter dialog box. Save the referral and try sending it again later.

Note 2: If you start a referral and then cancel out of the Create Choose and Book Referral Letter dialog box without saving it, the communication will remain on the patient's record. This is because a UBRN was requested from the Spine for this referral and the number cannot be returned or cancelled. You can however 'mark in error' the referral on the Communications screen and it will be removed to the Deleted node in the Clinical Tree.

⇒ Once the referral letter has been sent the Primary Care side of the process is complete. The referral will be reviewed by the Service Provider and rejected or accepted. If the referral is rejected for some reason the GP will be notified and will need to rebook into a more appropriate service.

11   How to Update your Referral Letter

NB: You can update and change the attachments you have sent as referral letters once you have submitted the original for Directly Bookable Services up until the freeze time is reached, and for IBS up until the referral is accepted. Each time you change the referral letter and attachments and resend them, they will appear in the hospital clinician's worklist for them to review once again.

⇒ Access the Choose and Book dialogue box via the right click menu.
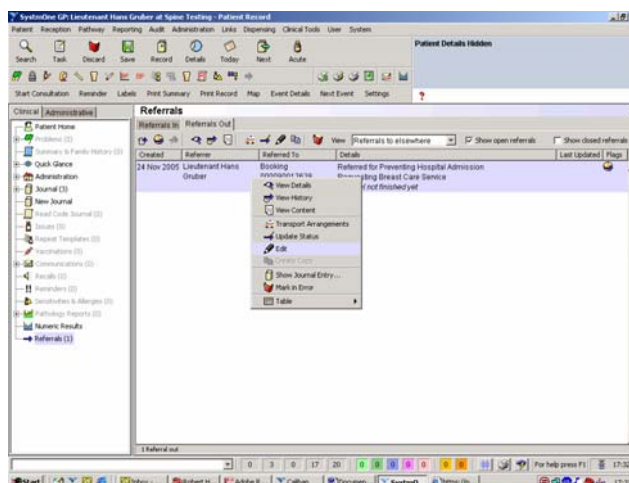
⇒ You now see the referral you have previously sent. Make any amendments to your referral letter as you wish in SystmOne

⇒ You can print the updated referral letter by clicking on "**Print Patient Letter**"

⇒ Click on **Send Referral** to resend your referral information
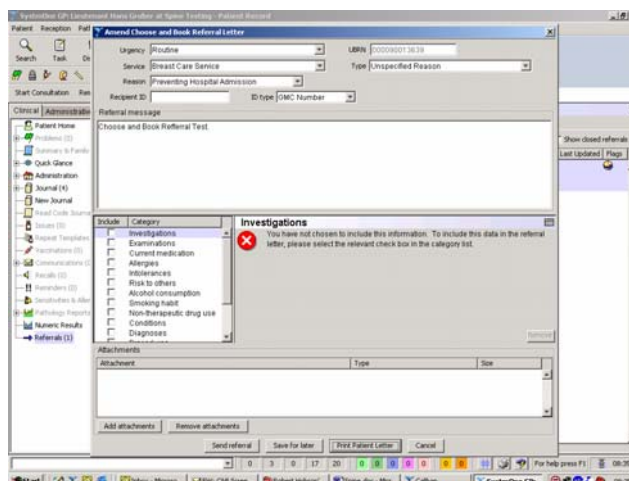
⇒ Sending the revised referral updates the "Last Updated" column in SystmOne and sends the referral to Choose & Book.
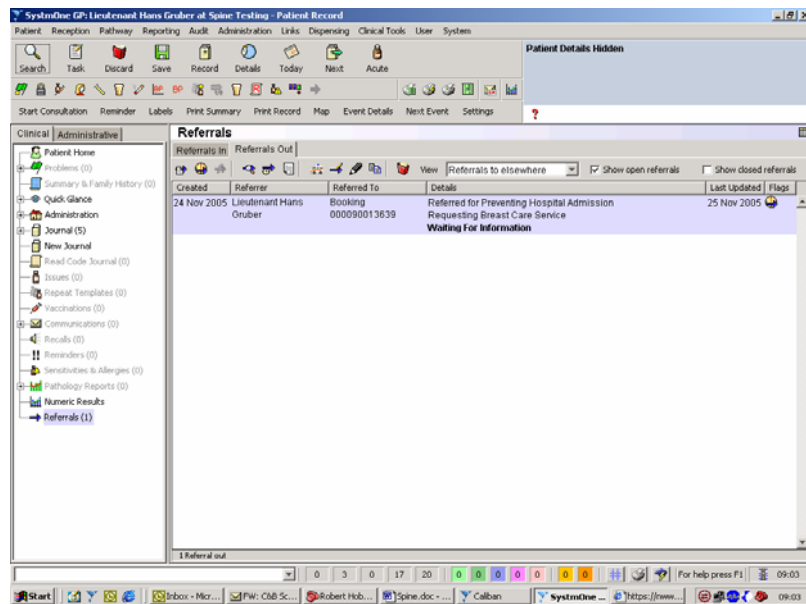
⇒ Previously sent Referrals can be tracked for any patient on the Choose & Book home page. This can be accessed through the main Administration menu:
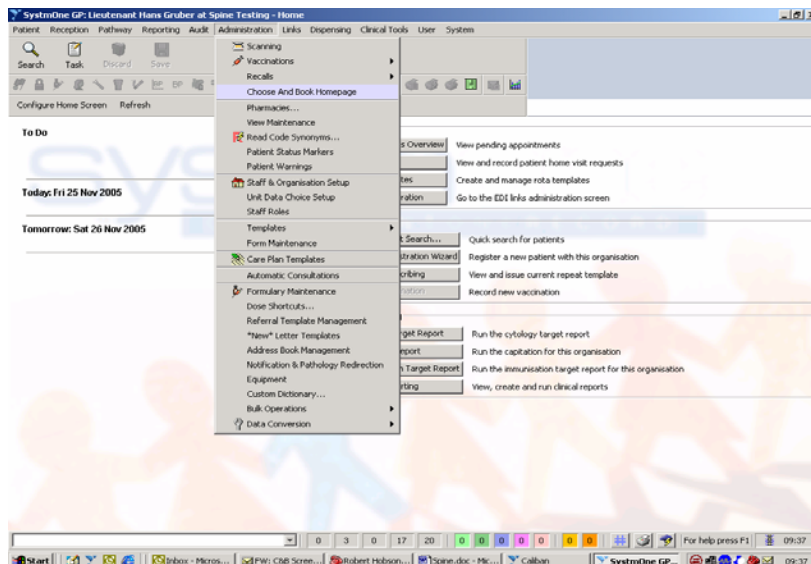
12   Reviewing Worklists

When using Choose and Book, you can review the progress of your patients in the booking process by reviewing your worklists.

There are 4 worklists for a GP:

- Activity List
- Advice and Guidance Responses
- Rejected Referrals
- Outstanding Referral Letters

You can access the advice and guidance responses that you receive from service provider Clinicians through the worklist screen in Choose & Book.

⇒   Access Choose and Book via Internet Explorer (see section 6)

⇒ The Choose & Book Home Page will display

⇒ Click on   Worklists to see your worklists

12.1. To open a worklist

⇒ You can now filter the patients you see in your worklists, by selecting your name from the pick list of Clinicians, to view only those patients within your practice that you have referred. If you do not filter your worklists by Clinician, you will see all patients from your practice that has been referred via Choose and Book.

⇒ To open one of the worklists, click on the blue triangle next to the worklist you wish to view, or click on the word (e.g. Activity List)

▶ Activity List

12.2. Activity List

⇒ You can see, for those patients referred and/or booked by your practice, where they are in the system.

UBRN	The patient's unique booking reference number
Booked (Y/N)	This tells you if your patient has or has not booked their appointment yet
Referral Status	The status of the referral including the advice and guidance status
Submitted Date	Date the appointment request was submitted
Referrer	The name of the referrer
Named Clinician	Name of the Clinician to whom the patient is being referred
Patient Name	The name of the patient with that UBRN
Last Activity Date	When the last activity was completed on this UBRN by any user

⇒ Click on the Unique Booking Reference Number (**UBRN**) of the patient you wish to review

⇒ Click on and select the task you want to perform (e.g. view history or cancel an appointment etc)

⇒ You then proceed with the action you have selected

12.3. Advice and Guidance Responses

⇒ You can see the responses for any requests for advice and guidance that you have requested from a hospital Clinician team.

UBRN	The patient's unique booking reference number
Priority	Tells you the priority with which your request was sent
Submitted Date	Date the appointment request was submitted
Response Date	The date that the A&G request was responded to by the hospital Clinician
Referrer	The name of the referring Clinician who sent the advice request
Service Name	The name of the service that the advice request was sent to
Specialty	The name of the specialty
Clinic Type	The name of the clinic type
Patient Name	The name of the patient for whom the advice request was sent

⇒ Click on the Unique Booking Reference Number (**UBRN**) of the patient you wish to review the response for.

12.4. Rejected Referrals

⇒ You can see any referrals that have been rejected by the hospital you tried to book your patient in to.

UBRN	The unique booking reference number of the patient whose referral was rejected
NHS	NHS number of the patient whose referral was rejected
Submitted Date	The date the referral was submitted
Service Override	Was the service selection booking guidance recommendation overridden by the referrer for that referral?
Rejection Reason	Reason selected by Provider Clinician for rejection
Location	The location of the service for the referral
Referrer	Name of the referrer
Named Clinician	Name of the Clinician to whom the patient is being referred
Patient name	Name of the patient referred

NB: Any patients in this list will need to be contacted by your practice to inform them that their booking is now cancelled, and they will need to be re-booked or re-referred. The hospital will not be contacting any patients for whom they have rejected the referrals for.

12.5. Outstanding Referral Letters

⇒ You can see if there are any patients that have bookings, for whom you have not written/sent a referral letter.

NB: Until you send a referral letter, the hospital will have no information about your patient to review.

UBRN	The unique booking reference number of the patient whose referral was rejected
NHS	NHS number of the patient whose referral was rejected
Submitted Date	The date the referral was submitted
Service Override	Was the service selection booking guidance recommendation overridden by the referrer for that referral?
Location	The location of the service for the referral
Lead Time	The closing date by when you need to have sent a referral letter
Referrer	Name of the referrer
Named Clinician	Name of the Clinician to whom the patient is being referred
Patient name	Name of the patient referred

⇒ Complete the referral letter as in section 10.

13   How to Change or Cancel an Appointment Request

⇒ Access Choose and Book via Internet Explorer (see section 6)

⇒ The Choose & Book Home Page will display

⇒ You first need to find your patient and their current appointment booking

⇒ On your Homepage, there are two ways to find the patient and the appointment booking you are wanting to cancel or change:

- Either **search** for the patient by their UBRN, NHS Number or demographics (see section 8)
- Or click on '**Activity'** in the Worklist section

13.1. How to Cancel an Appointment Request

⇒ Click the **UBRN** for the appointment request.

UBRN
0000-9000-0355

⇒ Click Actions ▾ and select **Cancel Request**

⇒ Select a Cancel **Reason**

Reason: [▾]
Appt. made for wrong patient
Appt. made with wrong provider
By patient – reason not specific
By provider – reason not specific
Clinic cancelled
Clinic overrun
In holiday period
Not specified
Other more urgent engagement
Patient died
Patient ill
Slot cancelled

⇒ Click   Cancel Request

⇒ The system warns you that you are about to cancel the appointment request.

Cancel Alert
The appointment request will be cancelled. Do you wish to proceed?

Yes   No
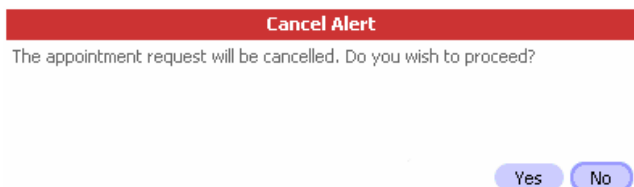
⇒ Click   Yes   if you are sure you wish to cancel the appointment request

⇒ Click   Close

13.2. How to Change or Update an Appointment Request

⇒ Click the **UBRN** for the appointment request.

UBRN

0000-9000-0355
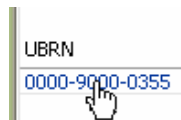
⇒ Click Actions ▼ and select **Update/Book**.

⇒ You now see the main booking screen where you can change the criteria of
    your search for services and search for and select different services that are
    appropriate to your patient (see section 4.5).
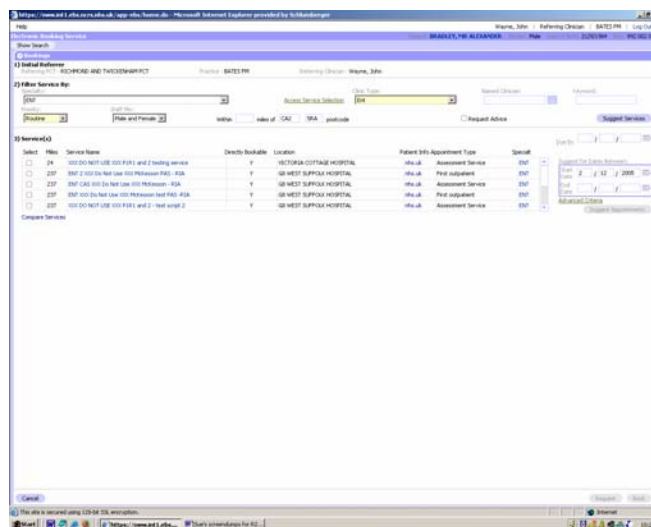
⇒ Progress with an appointment request (see section 5).

14   Changing or Cancelling an Appointment Booking for <u>Directly Bookable Services</u> only

NB: For the appointment to be amended or cancelled, the appointment must have been booked as a <u>directly</u> bookable appointment (any IBS appointments must be cancelled with the Booking Manager of the Service the patient holds an appointment with).

⇒ Access Choose and Book via Internet Explorer (see section 6)

⇒ The Choose & Book Home Page will display

⇒ Search for the patient (see section 8)

⇒ Remember that to be able to cancel or change a booking, the appointment must have already been booked as a <u>directly</u> bookable appointment (Any IBS appointments must be cancelled with the IBS call centre).

⇒ You first need to find your patient and their current appointment booking.

⇒ On your Homepage, there are two ways to find the patient and the appointment booking you are wanting to cancel or change:
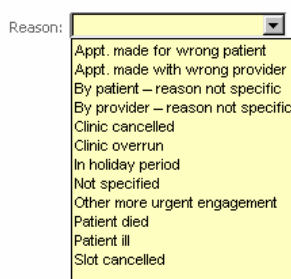
- Either search for the patient by their UBRN, NHS Number or demographics

- Or click on 'Activity' in the Worklist section

14.1. How to Change a Directly Booked Appointment Immediately

⇒ Click the patient's **UBRN** for the appointment that you wish to change.
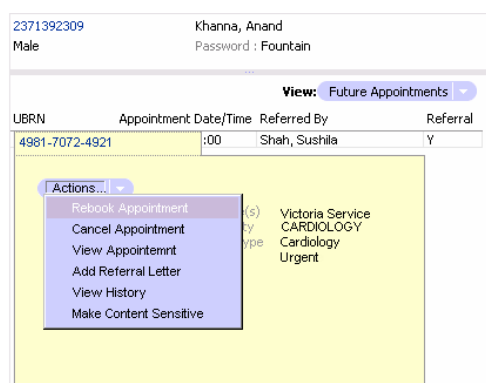
⇒ Click Actions and select **Rebook Appointment**. Rebook effectively means you are cancelling the old booking and rebooking a new appointment

⇒ You now see the services that the patient can rebook in to on the main booking screen.
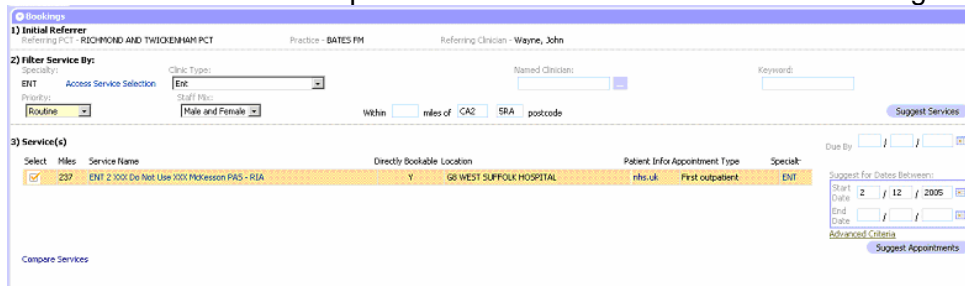
⇒ You have the option here to either make a new booking immediately, or to Cancel the current appointment now and Rebook later, by clicking on Cancel Appointment, Rebook Later . You then follow the steps shown in section 14.2.

⇒ Click [Suggest Appointments]

⇒ You now see the appointment slots for you to choose from with the patient. Continue making the new booking as in section 6.

⇒ Choose and Book will cancel the old appointment booking automatically when you make the new booking.

14.2. How to Cancel an Appointment Booking for Directly Bookable Services

NB: The GP in the surgery can only cancel an appointment for a Directly Bookable Service, as IBS services cannot be cancelled electronically via Choose and Book. If you want to cancel an IBS-booked appointment, you will need to contact the IBS service to ensure that that appointment is cancelled in the IBS's Hospital PAS.

⇒ Click the patient's UBRN for the appointment that you wish to cancel

⇒ Click [Actions ▼] and select **Cancel Appointment**

⇒ Choose and Book shows you the Cancel Appointment screen, which displays the details of the appointment already made.

⇒ Select a reason for you cancelling the appointment from the pick list (NB: this is a yellow field so is mandatory)

⇒ You can either cancel just this appointment so that you or the patient can   make   a   new appointment later, or you can also cancel the appointment   request at this stage if you want to cancel the whole referral.

⇒ If you wish to cancel both the appointment booking and the Appointment Request, click on the box next to **Cancel Appointment Request** to put a tick in the box

⇒ If you wish to just cancel the appointment booking only, do not put a tick in the box

⇒ Click [Cancel Appointment]

⇒ Choose and Book gives you a warning message to confirm the action you are about to take. Click [Yes]

15   Manage Rejected referrals

Once you have sent a referral letter in Choose and Book and the patient has had a booking made, the booking and letter can be reviewed by the Provider. The Provider Clinical Team can review your referral letter and they can then accept or reject your referral. If they accept the referral and booking, you need take no further action.

If however, the Provider rejects your referral and booking, you will need to contact the patient to ensure they do not go to the Provider and to progress their care further if required.

15.1. Finding a Rejected Referral

⇒ Access Choose and Book via Internet Explorer (see section 6)

⇒ The Choose & Book Home Page will display

⇒ Click on Worklists to see your worklists

⇒ You can select your own name from the pick list of **Referrers**, so you only see those patients you have personally initiated an appointment request for, or who you have made a booking for. Click on the pick list and select your name.

⇒ Click on **Rejected Referrals** to reveal your worklist of any referrals that have been rejected

⇒ Click on the **UBRN** of the rejected referral and you can read the explanation of why the referral was rejected, from the hospital Clinician

⇒ Click on Actions ▾ , you can then select whichever action you wish to take with your patient (e.g. to change the appointment request click on **Update/Book**; to cancel the whole referral, click on **Cancel Request**; to update your referral letter, click on **Modify Referral Letter** etc.)

⇒ You can close the worklist by clicking on the **UBRN** and then clicking on **Rejected Referrals**.

16   Browse the Directory of Services (DOS)

In Choose and Book there is a Directory of Services (DOS) which is a huge repository with detailed information about all services from all Providers in England. You can browse all the services loaded in the DOS without initiating any appointment requests or bookings.

⇒ Access Choose and Book via Internet Explorer (see section 6)

⇒ The Choose & Book Home Page will display

⇒ From your Home Page, click Directory of Services

⇒ You can now select particular search criteria and then ask Choose and Book to search for and show you all services within the DOS that meet your search criteria.

⇒ You can search for services by **Specialty**, or **Services** or **Keyword**

⇒ Click   Search

⇒ You now see <u>all</u> the services loaded in the DOS that meet your search criteria (not just those your own PCT has commissioned)

⇒ Click on the **Service Names** (in blue) to give you the detailed information loaded in the DOS for that service. Use the scroll bars on the right and to the bottom of the view to see all services relevant to your search.
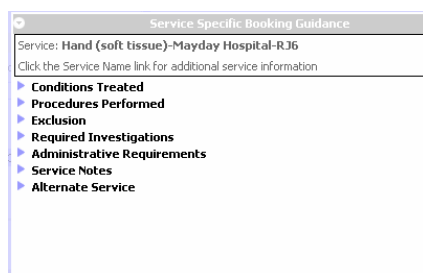
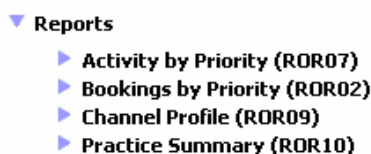⇒ Click on the emboldened subheadings to see the information about this service
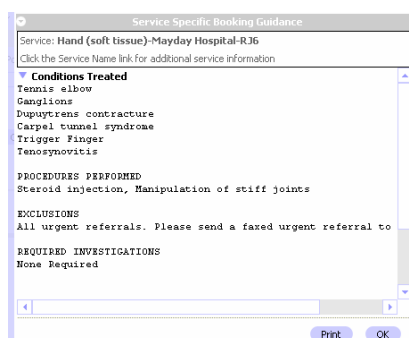
⇒ You can print the information by clicking on   Print

⇒ Click   OK   to return to the list of DOS services

17   Review Reports and Enquiries

17.1. Reports

There are reports available to the GP that use data collected as patients are booked using Choose and Book. Reports are pre-defined sets of information for a pre-set period of time. The pre-set period of time for reports is a calendar month and they are generated retrospectively.

⇒ Access Choose and Book via Internet Explorer (see section 6)

⇒ The Choose & Book Home Page will display

⇒ Click on Reports

⇒ Select the report you wish to view

> ▼ Reports
> > ▶ Activity by Priority (ROR07)
> > ▶ Bookings by Priority (ROR02)
> > ▶ Channel Profile (ROR09)
> > ▶ Practice Summary (ROR10)

⇒ Click on Print to print off the report you are viewing

⇒ Click on Close to return to your Home Page

17.2. Enquiries

Choose and Book runs enquiries to give you more information. An Enquiry is similar to a report with pre-defined information. You can define your own 28 day time period for an enquiry.

⇒ Access Choose and Book via Internet Explorer (see section 6)

⇒ The Choose & Book Home Page will display

⇒ Click on Enquiries

⇒ From the pick list of enquiries, select **Enquiry Type** you wish to view

> Enquiry Type ▼
> Cancelled Appointments Enquiry
> Cancelled UBRN Enquiry
> DNA'd Appointments Enquiry
> Due Date Exceeded Enquiry
> Two Week Wait Enquiry

⇒ You can print off your enquiry by clicking on Print

⇒ Click on Close to return to your Choose and Book Home Page

18   Updating Patient Details in Choose and Book

Patient Details are held on the Patient Demographic Service (PDS) on the Spine. It is good practice for a GP to check their patient's details held on the PDS each time you use Choose and Book or the GP system, and if required, to update the details with the patient.

18.1. Accessing the Update Patient Details Section

⇒ In Choose and Book, you can update specific demographic information about a patient and add a patient password.

⇒ You can access this section in 3 ways:

First, search for and select your patient from the Spine (see section 4), then

1. Click [Update] , then click [Update Person]

2. or Click on the blue NHS number , Click [Actions ▾] and select [Update Person]

3. or Click on **Update Person Details** when processing an appointment request or

   booking.

18.2. Updating Patient Details

⇒ You are presented with the **Patient Information and Preferences** screen

⇒ Check the patient's details (names, date of birth, GP details, telephone contacts) with the patient

⇒ Add or change the patient information and preferences as needed. You can insert or change the consent to call back, patient password, preferred language, home contact, mobile contact, work contact, temporary contact and disabilities

⇒ Click [Submit] and the PDS will be updated